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DATA WAREHOUSE STANDARDS AND ARCHITECTURE REVIEW

Case Study

ADS *Financial Services Solutions* is a strategy consulting and systems integration firm dedicated to serving the needs of the financial services industry. ADS offers rapid, cost effective solutions to its clients' business challenges through its in-depth financial industry expertise, project management expertise, and technology expertise.

SITUATION

A large bank in the southeast developed a Data Warehouse/Data Mart environment a number of years ago to provide critical input into processes for defining, quantifying, analyzing, and meeting the business objectives of the organization. As their Data Warehouse/Data Mart environment expanded to meet the needs for timely and accurate management reporting, customer analysis and profitability reporting, credit risk reporting, sales and incentive reporting, and product performance and budgeting, the bank developed an architectural roadmap to assure that the data warehouse environment continued to provide business value in an efficient and cost-efficient manner. The bank then engaged ADS to provide an objective third party review of their current and proposed architectural environments and supporting processes, and to identify enhancements to based on experience and best practices.

CHALLENGE

The bank recognized that what they had developed to date was a somewhat decentralized, disjointed data warehouse environment that lacked long-term strategic vision. Although currently serving the needs of Corporate Finance, Marketing, and several other business units, the present data infrastructure lacked scalability, and promoted escalating maintenance costs and future data quality issues. To combat these conditions, the bank developed an end-state architecture and asked ADS to validate their concept. Additionally, this financial institution requested that ADS develop/modify standards and processes that would govern future data marts in order to help migrate the data warehousing functions to the desired architecture. Since the intent was to implement those standards in order to lead the organization towards the desired end-state, processes had to be modified to ensure that the standards developed were applied and enforced. Finally, input was solicited from a wide range of stakeholders in order to build a cooperative environment and to ensure that the standards and processes developed met the needs of the bank as a whole.



DATA WAREHOUSE STANDARDS AND ARCHITECTURE REVIEW *(continued)*

APPROACH

In order to accomplish these objectives, ADS was engaged to perform the following **4 work steps** as outlined below:

- Assess Current State of the Data Warehouse
- Validate the End-State Architecture approach
- Develop standards that would guide efforts in the future
- Review, Revise and Finalize standards with key stakeholders

Before attempting to specify architectural or procedural standards, it was first important to understand the current environment so that the solution could be tailored to the specific needs of the bank. ADS worked with a broad range of stakeholders to fully understand and appreciate both the technology as it was currently implemented and the business drivers behind the current implementations.

After documenting the problematic areas of the current environment, the next step represented a review of the proposed end-state architecture. This review focused on the general approach and served to establish the guiding principles that would be used in formulating the data warehousing standards.

Once the high level approach and guiding principles had been formulated, ADS began the construction of the actual data warehousing standards. This step was intended to take the high-level conclusions drawn, and to codify very specific rules for new projects that would specify where certain architectural elements would reside and how data would be accessed by data marts. In addition to the data warehousing standards, it was important to modify project quality assurance processes to include verification that those standards were followed. While it was recommended that the standards be fully implemented for any new data marts, a waiver process was also recommended to accommodate instances when critical business needs temporarily superseded established procedure.

Finally, these recommendations were reviewed and revised with the appropriate stakeholders, and a report was presented to the bank with ADS recommendations.

RESULT

ADS provided the bank with a well-documented approach to migrating/evolving the current Data Warehouse environment to the proposed end state. Included in the report were both the architectural approach and enhancements to their original plan, as well as documented processes for data stewardship, pre and post project adherence review, and waivers to the standards.

BENEFITS REALIZED

Besides validating the bank's overall migration strategy and providing a holistic approach to the environment, the exercise created a cooperative environment between IT and Business. The use of ADS as an independent third party resulted in the two groups working together to address the key findings and recommendations.

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